USP56M
Programming personal training with clients

Unit reference number: F/507/5607
Level: 3
Guided Learning (GL) hours: 48

Overview
This unit is about consulting with apparently healthy adult clients to gather the information to design, manage and adapt personal training programmes. Learners will develop the knowledge and skills to collect and record information from clients and analyse and use this information to plan a personal training programme. Learners will also develop the knowledge and skills to prepare and manage a personal training programme, review progress with clients and adapt the programme to meet client needs.

Learning outcomes
On completion of this unit, learners will:

LO1 Know how to collect and record client information to plan a personal training programme
LO2 Know how to analyse client information and use this to agree goals and plan a personal training programme
LO3 Know how to prepare and manage a personal training programme
LO4 Know how to review progress with clients and adapt personal training programmes
LO5 Be able to collect and record client information to plan a personal training programme
LO6 Be able to analyse client information and use this to agree goals and plan a personal training programme
LO7 Be able to prepare and manage a personal training programme
LO8 Be able to review progress with clients and adapt personal training programmes

Version 7
Assessment requirements

Learners must complete all **four** assessment requirements related to this unit:

1. Service portfolio
2. Graded practical assessment
3. External examination
4. Graded synoptic assessment

1. Service portfolio

Learners must produce a service portfolio that includes evidence of client consultations carried out with proficiency.

At a minimum the service portfolio for this unit must include, client consultation records, risk assessment records and programme planning records, covering all of the following:

- **Collected all client records**
  - Client profile
  - PAR-Q
  - Informed consent form
  - Risk assessment report or summary
  - Physical fitness assessment outcomes
  - Progressive programme cards and/or session plans
  - Client reviews

- **Collected all client information**
  - Personal goals
  - Lifestyle, medical history
  - Physical activity history and preferences
  - Posture and alignment, attitude and motivation to exercise
  - Barriers to participation
  - Current fitness level
  - Psychological readiness to change physical activity/exercise behaviour

- **Collected all physical measurements**
  - Blood pressure
  - Anthropometrics
  - Body composition
  - Cardiovascular fitness
  - Range of motion
  - Muscular fitness

- **Considered all client goals**
  - Short, medium and long term goals
  - SMART formula: specific, measurable, achievable, realistic, timely
  - Purpose – to improve fitness, improve motivation, address barriers to activity, improve skills and techniques, improve health, fun and enjoyment

- **Demonstrated all methods of gathering information**
  - Interviews
  - Questionnaires
  - Observation
  - Physical/fitness assessments
• Worked with all types of clients
  - Beginners
  - Experienced
  - With specific fitness needs
  - With general health needs
• Signposted clients to a minimum of 2 other professionals
  - Doctors
  - Physiotherapists
  - Psychologists
  - Registered dietitians
  - Registered nutritionists
  - Physiologists
  - Bio-mechanists
  - Counsellors
  - Sports therapists
  - Massage therapists
  - Specialist health/exercise professional
• Considered all hazards
  - Participant
  - Other exercisers
  - Exercise environment
  - Selected equipment
  - Inherent risks of exercise
• Considered a minimum of 4 legal and organisation procedures
  - Health and Safety at Work Act (1974)
  - Control of Substances Hazardous to Health
  - Reporting of Injuries, Diseases and Dangerous Occurrences Regulations
  - Electricity at Work regulations
  - First Aid regulations
  - Individual and organisation policies and procedures
• Planned client programmes for a minimum of 2 environments (1 not specifically designed for exercise)
  - Gym
  - Studio
  - Sports hall
  - Client’s home or other enclosed space
  - Outdoors
• Planned client programmes using all resources
  - Environment e.g. the use of a tree for balance in the outdoors
  - Portable equipment
  - Fixed equipment
• Planned client programmes using a minimum of 2 cardiovascular approaches (on different occasions)
  - Interval
  - Fartlek
  - Continuous
• Planned the use of correct lifting and passing techniques for both activities
  - Deadlift with barbell
  - Spotting
• Planned the use of all equipment
  - Resistance machines
  - Free weights
  - Cardiovascular machines
• Planned the use of a minimum of 4 resistance training approaches (on different occasions)
  - Pyramid systems
  - Super-setting
  - Giant sets
  - Tri sets
  - Forced repetitions
  - Pre/post exhaust
  - Negative/eccentric training
  - Muscular strength/endurance/muscular fitness
• Planned the use of a minimum of 1 core stability exercise
  - Stabilisation (local)
  - Mobilisation (global)
• Reviewed of all considerations
  - Progress
  - Necessary adaptations
  - New goals
  - Goals not being achieved
• Planned exercise and/or physical activities for all components of fitness
  - Cardiovascular fitness
  - Muscular fitness
  - Flexibility
  - Motor skills
  - Core stability
• Applied all the principles of training
  - Specificity
  - Overload
  - Progression
  - Reversibility
  - Recovery
  - Adaptation
The service portfolio is must be completed prior to learners undertaking the graded practical assessment. Evidence from the graded practical assessment must also be presented in the assessment portfolio.

Whilst service portfolios will not be graded, they may be sampled by the VTCT External Quality Assurer (EQA).

2. Graded practical assessment

Learners must carry out a complete consultation which will be observed, marked and graded by centre assessors. The grade achieved in the graded practical assessment will be the grade awarded for the unit.

The graded practical assessment must take place in a real or realistic working environment on a real or realistic client. At a minimum the graded practical assessment for this unit must cover:

- Consultation – to gather information from a client to complete the client profile, PAR-Q and informed consent
- Physical/fitness assessments – to gather information from the client to form baseline information to assess posture, height, weight, waist circumference, resting heart rate, resting blood pressure, body mass index (BMI), range of motion, muscular fitness, cardiovascular fitness (assessments selected as appropriate to the client’s needs)
- Risk assessment report or summary – to identify checks made to equipment, environment, clothing footwear
- Personal training programme card or session plan for an individual session
- Written progressive programme covering a minimum of 12 weeks
- Schedule of client reviews and methods of review

Recorded professional discussion can also be used as an assessment method attached to the graded practical assessment and is particularly useful for gathering evidence for criteria related to progression, adaptation, client review methods, evaluation and reflection. Professional discussions should be planned and recorded.

3. External examination

Whilst the theory content of LO1, LO2, LO3 and LO4 may be naturally assessed in the graded practical assessment, they will be tested by an external examination at the end of the period of learning.

External examinations will test knowledge and understanding from across the whole vocational area (mandatory units). Learners should use the unit content section of this unit to aid revision since exam questions will test the full breadth of this section.

External examinations will be set and marked by VTCT and will contribute to the overall qualification grade.
4. Graded synoptic assessment

In the last term or final third of their qualification, learners will be required to undertake a graded synoptic assessment. This will require learners to carry out a range of activities from across the whole vocational area (mandatory units). Assessment coverage will vary year on year, although all activities will be covered over time.

VTCT will set a brief for centres which will detail the activities to be covered in the graded synoptic assessment. Grading descriptors for the synoptic assessment will also be provided by VTCT.

The graded synoptic assessment will be marked and graded by centre staff and externally verified by VTCT.

The graded synoptic assessment will contribute to the overall qualification grade.
Unit content

LO1 Know how to collect and record client information to plan a personal training programme

Learners must know how to build rapport and develop effective working relationships with clients:

- Consultation room set up
  - Clean and tidy
  - Comfortable and warm
  - All equipment, resources and paperwork available
  - Appropriate health and safety checks
  - No interruptions or distractions
  - No barriers or obstructions, e.g. desk and chair positioning

- Establish rapport
  - Use client’s name
  - Address client personally
  - Engage the client through inclusion and involvement
  - Be supportive and approachable
  - Demonstrate interest and use appropriate communication skills

- Use appropriate communication skills
  - Positive and conversational verbal communication
  - Positive and friendly facial expressions
  - Open body language and gestures
  - Active listening
  - Open questions (as appropriate)
  - Non-judgement, empathy, sensitivity
  - Affirming and reflective statements
  - Accessible language

- Professional conduct
  - Professional boundaries
  - Scope of practice
  - Appropriate dress/appearance
  - Positive attitude
  - Show respect
  - Equal opportunities and inclusion
  - Punctuality

- Show sensitivity and empathy towards the client
  - The information they share
  - The client’s personal needs and goals
  - The barriers they identify and the client’s stage of readiness
• Explain own roles, responsibilities and boundaries
  - Role – to provide a safe and effective personal training programme
  - Responsibilities – to undertake pre-exercise screening, to plan a training programme, to instruct the client safely and effectively, to monitor and review progress and adapt exercises (where appropriate), to encourage long term behaviour change, to provide support when needed
  - Boundaries – work within own scope of practice

Learners must know the purpose of consulting with the client:
To gather information to plan a safe and effective personal training programme for apparently healthy clients
• Personal details – name, age, gender, address, contact details, preferred method of contact, emergency contact
• Medical history and current health status – current or previous medical conditions/injuries that may affect participation, medications that may affect participation
• Relevant lifestyle factors – smoking, alcohol, eating behaviour, physical activity levels, time spent in sedentary behaviour (home and/or work/school)
• Physical activity history – past and current levels of activity, past and current exercise experience and type of activity/exercise programme undertaken
• Physical activity preferences – likes and dislikes
• Reasons for exercise/activity and personal goals – improved health, weight loss, increased fitness, skill, motivation, fun and enjoyment, competition, social, strength, physique
• Barriers to participation – real or perceived
  - Intrinsic (self-esteem, confidence, fear, lack of motivation, lack of energy)
  - Extrinsic (family, work, time, finances)
• Health assessments and measurements – blood pressure, heart rate, height, weight, posture, Body Mass Index (BMI), waist and hip circumferences, bioelectrical impedance analysis
• Fitness assessments and measurements: functional assessments, posture and alignment, flexibility, cardiovascular, strength, endurance, balance, functional – to meet client needs

To identify client readiness to participate or reasons for referral or deferral
• Client ready to participate
  - Apparently healthy, negative ‘no’ responses to PAR-Q
• Clients who need to be referred or signposted
  - Positive ‘yes’ response to one or more PAR-Q questions – signpost to GP
  - Contra-indications (high blood pressure, irregular heart rate) – signpost to GP
  - Multiple cardiovascular disease risk factors (CVD) – signpost to GP
  - Injuries – signpost to GP, physiotherapist, sports therapist
  - Client needs fall outside the limits of professional responsibility or competence at level 2 – refer to more experienced/specialist instructor, specific populations instructor – level 3 or level 4
• Clients who need temporary deferral
  - Feeling unwell, minor illness (e.g. colds), minor injuries (e.g. muscle strain), excessive fatigue
  - Client presents with inappropriate clothing, footwear or equipment
To meet professional ethical and legal requirements
- REPs code of ethics
- Health and Safety
- Risk assessment
- Safeguarding
- Public liability insurance
- Professional indemnity insurance

Learners must know how to collect information from clients:
- Interview and consultation methods – formal, informal and appropriate communication skills
- Questionnaire – PAR-Q, PARmedX and PARmedX for pregnancy (medical), IPAQ (activity levels), EQ-5D (well-being), health commitment statement (ukactive)
- Observation – posture, gait, exercise alignment, movement ability, facial expressions
- Physical health assessments – blood pressure (manual and digital), anthropometrics, height and weight, body mass index (BMI), waist circumference, waist to hip ratio, body composition
- Fitness assessments
  - Cardiovascular fitness – use validated/recognised protocols e.g. Astrand bike test, Rockport walking test
  - Range of motion – use validated/recognised protocols e.g. sit and reach test, visual assessment during stretch positions
  - Muscular fitness – use validated/recognised protocols e.g. abdominal curl/sit-up test, press-up test

Learners must know the purpose and process of informed consent:
- Purpose – to provide the client with the information they need to make an informed decision regarding their participation in physical fitness assessments and also the exercise programme, to provide the client the opportunity to reflect on verbal and written information provided, to check the client’s understanding, legally admissible evidence
- Process – explain the reasons for informed consent, inform clients of the session aims and objectives, physical and technical demands (including the types of assessments and the purpose for using these assessments or types of activities planned and their relevance to the client’s goals), the benefits and risks of the planned assessments or exercise sessions, respond to client questions, recording signed consent, secure and confidential storage of written informed consent
- Content of informed consent record – aims, benefits, risks, responsibilities of client and instructor, record of questions and answers, date and signatures of client and instructor

Learners must know how to record and store client data and information:
- Appropriate records – PAR-Q, informed consent, fitness assessment data, programme and session plans
- Maintain client confidentiality – according to data protection legislation (e.g. confidential paperwork securely stored in locked filing apparatus, e-information password protected, coding system used on confidential forms instead of names), according to code of ethics, when to share information, who with and how to share
LO2 Know how to analyse client information and use this to agree goals and plan a personal training programme

Learners must know the client information that must be analysed and considered to agree goals and planning personal training programmes:

- Goals – process and outcome goals, short, medium, and long term, SMART goals (Specific, Measureable, Achievable, Realistic, Timely), consistent with industry good practice e.g. REPs
- Client objectives – general health and fitness (e.g. energy level), physiological (e.g. muscular endurance), psychological (e.g. self-esteem), lifestyle (e.g. diet), social (e.g. interaction), functional ability (e.g. mobility)
- Client health status – responses to PAR-Q, lifestyle, motivation, barriers, preferences, results from any physical or health assessments
- Physical or health assessment outcomes – blood pressure, range of motion assessments, posture
- Client fitness, skill and experience – beginner or experienced gym equipment user, motor skill and fitness levels
- Client readiness to participate – stage of change, readiness to change, barriers to overcome barriers (e.g. access, time, anxiety)
- Preferred training environment – gym, outdoors, client’s home or workplace, pool
- Client availability – time and dates

Learners must know the importance of agreeing goals with clients:

- To ensure the planned programme meets client goals
- To create short, medium and long term goals (process and outcome) that are SMART (specific, measureable, achievable realistic, timely) and meet the client’s needs, motivation, ability and commitment
- To assist client motivation and adherence – goals can be can be monitored and reviewed at regular intervals to provide regular motivational targets with rewards for achievement
- To promote adherence
- To enable responsive and flexible work with clients – modification, regression or progression of programme variables as required
- To build incentives and rewards
- To identify others who may need to be involved in goal setting
  - When to involve others – when outside limits of personal responsibility, for contraindications, and referrals, to improve motivation and support
  - Others – GP, professionals, colleagues, coaches, friends and family

Learners must know how to analyse and interpret information:

Review all information to identify

- Client readiness – participate, defer or signpost/refer to other professional
- Medical conditions that need referral – cardiac conditions (e.g. CHD), respiratory conditions (e.g. COPD, asthma), metabolic conditions (e.g. obesity and diabetes), musculoskeletal conditions (e.g. osteoporosis, arthritis, low back pain), neurological and neuromuscular conditions (e.g. dementia, multiple sclerosis), symptomatic clients (older adults, disabled, ante and post-natal)
• Other professionals who need to be involved – physiotherapist, osteopath, GP, massage therapist, specialist fitness instructor, personal trainer), referral procedures to follow (organisational requirements), when to refer clients
  - How assessment outcomes compare against normative data and national guidelines
  - Client needs that will influence programming – preferences, strengths, areas for improvement, motivation, commitment, readiness, availability
  - How the information will inform programming – exercise selection, progression and adaptation, specific needs and requirements

Learners must know how to use the information to plan a personal training programme:
• To meet client’s needs
  - Goals – improve fitness, improve motivation, weight management
  - Promote adherence – build motivation, fun and enjoyment, address barriers to participation, promote client choice and autonomy, increase confidence and self-efficacy, increase competence and ability
  - Instruction style – multisensory (visual, auditory and kinaesthetic) and use of appropriate instructional methods (e.g. NAMSET acronym - Name the exercise, Areas worked, Muscles used, Silent demonstration, Explanation, Teaching cues)
  - Overcome client barriers – problem solving techniques to overcome challenges, appropriate exercise and activity selection, exercise activities (ability, fitness level, enjoyment, client needs, peer group), appropriate time scheduling of exercise activities, accurate exercise information and advice, access to childcare, social support and inclusion, exercise partners/buddies
  - Dates, times locations of sessions
• To select exercise environment
  - Not designed for exercise: outdoors (parks, beaches, woodland), client’s home (room, garage, garden) or workplace and how to work safely
  - Designed for exercise – gym, studio, pool, sports hall
• To select equipment
  - Portable – mats, small portable equipment, e.g. stability ball, steps, medicine ball, skipping rope, bench, barbell, dumbbell, step, tubing
  - Fixed equipment – cardiovascular machines, resistance machines, Olympic bars, racks
• To plan session structure and content
  - Warm-up and cool down – duration, intensity and exercise/equipment choice suited to client needs, e.g. plan longer duration and a more gradual approach for older adults or clients with lower fitness levels
  - Main exercises – duration, intensity and exercise/equipment choice suited to client goals and needs, e.g. plan increased exercise complexity and range of movement for higher fitness or skill levels
  - Exercise intensity – use evidence based guidelines for exercise intensity prescription and monitoring, e.g. plan for lower resistances with higher repetitions for young people, plan slower exercise speeds for lower skill levels, plan lower target heart rates for lower fitness levels
To plan a progressive programme
- Meet longer term goals
- Application of fitness principles to design programmes and sessions, i.e. specificity, overload, progression, reversibility
- Use of programme variables to meet client needs and goals – e.g. frequency, intensity, duration/time, type (movement, equipment, ROM, speed), client preference and ability
- Integration of other physical activities into the programme – walking, active travel, to assist achievement of client goals, increase activity

Learners must know appropriate exercises to develop the components of fitness:
- Information sources and guidelines on safe and effective programme design
  - Organisations (ACSM, AHA, NICE)
  - Expert reviewed text books
  - Journals
  - Recognised websites
- Exercises to improve muscular fitness
  - Bodyweight resistance exercises – pull ups, chin ups, press ups, lunge, squat, abdominal curl, plank, back raise, triceps dips
  - Cable machine exercises – seated row with low pulley, lat pulldown (in front of chest), triceps pushdown with high pulley, biceps curl with low pulley
  - Free weights – exercise alternatives using both dumbbells (DB) and barbell (BB) where relevant: deadlift (as a safe lifting technique and as an exercise), lunge, squat (BB and DB), front raise, single arm row, single arm triceps press, bicep curl, shoulder press, lateral raise, upright row, bench press, bent arm pullover, chest flies, prone flye, supine triceps press
- Exercises to improve cardiovascular fitness
  - Cardiovascular machines – e.g. upright cycle, recumbent cycle, treadmill, stepper, rowing machine, elliptical trainer, cross trainer
  - Bodyweight cardiovascular exercises – e.g. step ups, running on spot, sprints, mountain climbers, burpees, jumping jacks, lunges
  - Variables of different machines – level, intensity, strokes per minute, revolutions per minute, kilometres per hour, step speed, incline, decline, impact, range of motion, muscle groups emphasised
- Exercises to improve flexibility
  - Types – static maintenance (short duration) and developmental stretching (extended duration – 15 – 30 seconds), dynamic (range of movement) stretching
  - When – during warm up (preparatory mobilisation and stretching), at the end of a session (flexibility component of cool down), between exercises (active recovery)
  - Stretching exercise positions – e.g. standing, sitting, kneeling or lying
- Muscles requiring stretching – those worked in session or identified as requiring lengthening to improve posture (e.g. pectorals, latissimus dorsi, triceps, biceps, abdominals, erector spinae, quadriceps, hip flexors, hamstrings, gluteals, adductors, abductors, gastrocnemius, soleus, tibialis anterior)
- Assisting aids – wall, step, strap, towel, gravity

- Exercises to improve motor skills
  - Specific to skill – speed, agility, reaction time, power, co-ordination, balance
  - Consideration to how each may be trained during other session components

- Activities of daily living
  - Active travel
  - Walking
  - Climbing stairs
  - Gardening
  - Desk breaks
  - Moving more often and sitting down less

Learners must know how to record a personal training programme:
- Appropriate language and layout, clear and easy to understand, use of diagrams (as appropriate)
- Information – exercises, equipment, intensity, duration
  - Records – programme card, exercise diary or log
  - Methods – written, ICT, audio
LO3 Know how to prepare and manage a personal training programme

**Learners must know the importance of long term behaviour change and the advantages of personal training:**
- **Behaviour change considerations**
  - Stages of change (pre-contemplation, contemplation, preparation, action, maintenance)
  - Readiness to change – client confidence and motivation
  - Importance of long term behaviour change – exercise adherence and maintenance, making progress, motivation levels
  - Strategies to ensure participants commit to long term change – prompting, contracting, block booking sessions, charting and rewarding attendance, positive feedback on progress, goal setting and review, social support, reduce barriers, provide exercise information and guidance
- **Advantages of personal training**
  - Expertise, enjoyment, personal support, social interaction, progress, improved motivation and adherence
  - Importance of client understanding advantages – commitment and motivation, adherence, optimise benefits, investment

**Learners must know how to plan and record a progressive programme to achieve client goals:**
- **Programme demands** – time commitments, physical demands
- **Timetable of sessions** – times, dates, venues
- **Review dates**
  - Methods to evaluate and review progress – fitness assessment, goal review, visual observation of client’s performance, discussion of progress with client, monitor written exercise records, compare progress goals and against objectives
  - Review schedules dates discussion, fitness assessment
- **Programme records**
  - Twelve week plan information – activities and exercises, application of the FITT principle (frequency, intensity, time and type), strategies, progressions, modifications, adaptations
  - Session plan or programme card information – warm-up phase, main phase, cool down and flexibility
  - Other session plan information – timings, exercise alternatives, teaching points), format of document

**Learners must know when to share the programme with other professionals:**
- **When** – aspects outside limits of personal responsibility, for contra-indications and referrals, to improve motivation and support
- **Who** – GP, other exercise or health professionals and colleagues, friends, family
- **How** – permission of client, maintain confidentiality, adhere to information transfer procedures
Learners must know how to plan to minimise risks when delivering personal training:

- Undertake a risk assessment of the exercise environment and equipment to check
  - Hazards and risks to be managed
  - Temperature, space, other gym users
  - Other professionals who can support with health and safety issues, e.g. first aider, health and safety officer, duty manager, gym manager
  - Availability of equipment
  - Client clothing, footwear, chewing gum, water availability
  - Storage of equipment – free weights, stability balls, mats, collars, benches
  - Organisation guidelines for reporting equipment that is faulty or requires maintenance

- Minimise risks
  - Plan risk control measures
  - Appropriate exercise selection or alternatives
  - Safe exercise supervision
  - Awareness of other activities happening at the same time to minimise injury from other individuals using equipment in close proximity
  - Report any issues using appropriate procedures

Learners must know how to maintain contact with clients between sessions:

- Agree with client using appropriate negotiation and communication to reach a mutual agreement

- Methods
  - Email
  - Telephone
  - Post
  - Text message
  - Face to face
LO4 Know how to review progress with clients and adapt personal training programmes

**Learners must know the purpose of reviewing progress with clients:**
- To assess progress – review training log or programme card, monitor achievement of goals (short, medium, long term) and adaptations – using appropriate assessments/measures, use agreed evaluation guidelines to compare progress and performance against goals, fitness assessment results
- To identify and take account for any changes in circumstances (e.g. health, socioeconomic, time, support)
- To redefine and revise goals not being achieved and identify goals already achieved and set new goals
- To adapt the programme as required, e.g. identify exercises or physical activities which need adaptation to achieve goals, identify more suitable resources and environments, and identify change of resources and environment to achieve variation, according to client preferences and needs
- To gain client feedback on their progress – enjoyment, satisfaction, preferences, performance improvements, any dislikes
- To give client feedback – positive, constructive, motivational, confidential, timely, clear and accurate, positive reinforcement of specific strengths and progress, constructive identification of specific areas for improvement, give personalised ways to address weakness, ensure the client’s understanding, provide verbal information on managing own future activities, e.g. suggested activities, training recommendations or guidelines
- To review outcomes – strengths, areas for improvement and adaptations required
- To identify and agree any changes – use communication and negotiation skills to reach a mutual agreement on changes
- To identify and reward achievements
- To provide motivation
- To promote adherence

**Learners must know how to review progress with clients:**
- Agree review dates and review methods in advance
- Explain the purpose of review
- Review goals and their achievement
- Review programme
- Encourage client views
- Identify and agree changes
- Conduct relevant physical assessments (when appropriate)
- Use agreed evaluation guideline to compare progress and performance against goals, fitness assessment results
- Give feedback to clients
- Review outcomes
- Discuss and agree adaptations
Learners must know how to adapt personal training programmes:

- **Session structure**
  - Duration of components
  - Intensity of components
  - Type of exercise in each component
  - Equipment included in each component
  - Environment used for session

- **Intensity of exercises**
  - Appropriate to component of fitness being targeted
  - Repetitions
  - Sets
  - Rate
  - Range of movement
  - Resistance

- **Methods of monitoring intensity**
  - Rating of perceived exertion (RPE)
  - Target heart rate zones
  - Observation
  - Talk test

- **Training approaches**
  - Cardiovascular – intervals, continuous, Fartlek
  - Resistance – circuit weight training, single set, pre and post exhaust, pyramids, super sets

- **Individual exercises**
  - Position
  - Equipment
  - Exercise used
  - Lever length
  - Comfort
  - Base of support
  - Stability

- **Application of principles**
  - Frequency of sessions
  - Progressive overload
  - Specificity
  - Reversibility
Learners must know reasons for adaptation:
- Client request
- Client preference
- Goal not achieved
- Goal achieved
- Outcomes of reviews and assessments
- Lapse in training
- Re-define goals to meet client needs
- Changes in circumstances, e.g. injury, availability, health change
- Agree adaptations, progressions or regressions with client

Learners must know how to record changes to the programme:
- Records – programme card, exercise diary or log
- Methods – written, ICT, audio
- Information – new goals, client views, adaptations, reasons for changes, changes made
LO5 Be able to collect and record client information to plan a personal training programme

Welcome the client and use appropriate communication skills to build rapport:
- Positive and appropriate communication for client confidence and experience
- Appropriate set up of environment
- Show sensitivity and empathy towards information gathered and shared by the client
  - Personal needs and goal
  - Barriers presented
  - Stage of readiness
  - Client feedback
  - Outcomes of assessment

Collect client information using appropriate methods, including PAR-Q and physical assessments:
- Gain the clients informed consents prior to any assessment
- Collect client information – personal details, goals, lifestyle, medical history, physical activity history, current health status, activity preferences, barriers to participation
- Adapt and tailor interpersonal communication during the consultation to thoroughly elicit information
- Interview and consultation methods
  - Completion of PAR-Q
  - Completion of informed consent
  - Observation and assessment of posture
  - Conduct physical health assessments:
    - Blood pressure (manual and digital)
    - Anthropometrics
    - Height and weight
    - Body Mass Index (BMI)
    - Waist circumference, waist to hip ratio, body composition
  - Conduct fitness assessments (as appropriate)
    - Cardiovascular fitness – use validated/recognised protocols, e.g. Astrand bike test, Rockport walking test
    - Range of motion – use validated/recognised protocols, e.g. sit and reach test, visual assessment during stretch positions
    - Muscular fitness – use validated/recognised protocols, e.g. abdominal curl/sit up test, press-up test

Provide feedback on the outcomes of assessments:
- Positive, constructive, concise, motivational

Collate client information and record using an appropriate format:
- Client profile records

See LO1
LO6 Be able to analyse client information and use this to agree goals and plan a personal training programme

Use client information to agree client goals and objectives and identify their readiness to participate:
- When to refer
- When to defer
- When to signpost and involve other professionals
- SMART goals – short, medium and long term

Use client information to plan a personal training session to meet client goals and needs:
- All information should be analysed and used to plan a personal training session that meets the client’s needs and goals, with consideration to the outcomes of all assessments conducted and all client information gathered
- Identification of other services or products that could be promoted to meet client needs

Agree programme demands, timetable of sessions and evaluation and review methods with the client:
- Outline of types of exercises and frequency of sessions
- When the programme will be reviewed
- Methods of assessment that can be repeated and reused to inform the review, e.g. fitness assessment or posture observation

See LO1 and LO2
LO7 Be able to prepare and manage a personal training programme

Plan a detailed progressive personal training programme to achieve client goals:

- Record client goals
- Record number of weeks and number of sessions per week
- Record all components of the session
  - Warm-up (mobility, pulse raiser and stretch)
  - Cardiovascular exercises
  - Resistance exercises
  - Cool down and stretching activities
- Record – environment, exercise/equipment name, reps, sets, intensity, duration, level or resistance, muscle group, realistic timings and sequences, alternatives and progressions, teaching points
- Record review dates and methods
- Record changes and adaptations to the programme
- Record client feedback and personal notes
- Record health and safety considerations
- Plan appropriate use of the principles and variables of training to meet the client’s needs and goals
- Any other professionals the programme needs to be shared with
- Consider how the planned progressive programme reflects the clients longer term goals, individual needs and potential to support long term behaviour change

Agree how to maintain contact with client between sessions:

- Method of contact, e.g. telephone, email or text
- Frequency of communication
- Circumstances for communication, e.g. motivation, cancellation

Record all details of the personal training programme using an appropriate format:

- 12 week progressive programme overview plan with inclusion of detailed and full programme of one planned session with the client

See LO2 and LO3
LO8 Be able to review progress with clients and adapt personal training programmes

Select appropriate methods to gather information to inform the review progress:
- Including review of programmes, repeat assessments and client feedback
- Consider how progress reviews and trainer feedback can influence client progress and motivation

Discuss the purpose of reviewing progress and negotiating changes with clients:
- Provide client with feedback
- Negotiate changes with clients
- Adapt the personal training to meet review outcomes
- Record programme changes and adaptations using an appropriate format – programme card, progressive programme or training diary

See LO4
Employability skills to be demonstrated throughout the graded practical assessment and synoptic assessment

**Professionalism:**
- Adhere to industry codes of ethical practice, e.g. REPs, ukactive
- Adhere to relevant legislation, e.g. health and safety, equality

**Communication:**
- Adapt and tailor communication approach for different clients, e.g. new and existing clients – special populations (young people, older adults, ante- or post-natal women, disabled people), clients who are new to exercise, clients who are experienced exercisers, clients with different levels of motivation, clients with other needs, e.g. speakers of other languages, deaf or partially hearing, blind or partially sighted
- Communication – speaking manner and tone of voice, being supportive, respectful, sensitive to client, use open questioning and active listening to gather information, be aware of body language, eye contact, gestures, posture, space and proximity. Sensitivity to clients with different communication styles

**Customer service:**
- Principles of customer service – quality, keeping promises, managing customer expectations, customer satisfaction, speed of service, follow organisation procedures for meeting and greeting and inducting clients to equipment. REPs code of conduct to inform all client working practices
- Examples of good practice in customer service – meeting and exceeding customer needs and expectations, adding a personal touch, providing personal attention, knowing client names, using polite language, making extra efforts to demonstrate willingness to please the customer, treating the customer as an individual
- Dealing quickly and effectively with a complaint – acknowledge complaint immediately (HEAT – Hear, Empathise, Apologise, Take action), handle complaints (privately, positively, confidently, professionally, promptly, confidentially, empathetically, with trust and respect, to client’s satisfaction), follow agreed procedures to check complaint has been dealt with
- Use of incentives and rewards, free or reduced cost training sessions, or guest passes, gym challenges, social events, rewards, e.g. member of the month (based on attendance). Appropriate information sources to keep members up-to-date and informed about activities: Timetables, noticeboard, e-mails, REPs code of conduct
- The importance of customer service to a business – professional image, reputation of instructor, organisation and industry sector, exercise adherence, customer retention, customer satisfaction, customer relationships and repeat business, including word of mouth recommendations and referrals

**Commercial awareness:**
- Eco-friendly and cost-efficient use of resources (e.g. time, disposal of waste, use of products and consumables). Provision of water for bottles but no paper/plastic cups, use of non-toxic and ecologically friendly cleaning products, recycling paper towel, shredded programme cards and other documents. Turning equipment and air conditioning off overnight
- Opportunities to promote and sell additional products and services, e.g. personal training sessions, training products (clothing and footwear, exercise mats, heart rate monitors, water bottles)
- Opportunities to promote other exercise sessions and services offered by the facility, e.g. group exercise and studio classes, swimming, racquet sports, sports massage, physiotherapist, nutritionist, café, beauty therapy
- Awareness of competitors. Other gyms and fitness facilities available locally, their benefits and disadvantages. Different business types locally that may compete for a
client’s disposable income. Diets and weight loss services that clients may choose as an alternative to gyms or personal training

- Unique selling points of products and services. Combination of facilities and services offered that are not available elsewhere. Specialities and target market niches. Opportunities to differentiate self and services from competitors, e.g. other personal trainers. Own experiences and achievements relevant to supporting others in a fitness capacity
**Assessment criteria**

Assessment criteria will be applied to the graded practical assessment. In order to pass this unit, learners must at a minimum achieve all pass criteria. The pass criteria relates to the proficient demonstration of skills and knowledge. All criteria within a given grade must be achieved to be awarded that grade.

<table>
<thead>
<tr>
<th>Learning outcome</th>
<th>Pass</th>
<th>Merit</th>
<th>Distinction</th>
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<tbody>
<tr>
<td><strong>The learner will:</strong></td>
<td><strong>The learner can:</strong></td>
<td><strong>To achieve a merit grade, in addition to achievement of the pass criteria, the learner can:</strong></td>
<td><strong>To achieve a distinction grade, in addition to achievement of the pass and merit criteria, the learner can:</strong></td>
</tr>
<tr>
<td>LO5 Be able to collect and record client information to plan a personal training programme</td>
<td>P1 Welcome the client and use appropriate communication skills to build rapport</td>
<td>M1 Adapt and tailor interpersonal communication during the consultation to thoroughly elicit information</td>
<td>D1 Evaluate the effectiveness of communication skills used during the consultation</td>
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<td></td>
<td>P2 Collect client information using appropriate methods, including PAR-Q and physical assessments</td>
<td>M2 Adapt and tailor assessments used during the consultation to meet client needs</td>
<td>D2 Justify how the planned progressive programme reflects the client’s longer term goals, individual needs and potential to support long term behaviour change</td>
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<td>P3 Provide feedback on the outcomes of assessments</td>
<td>M3 Display organisation skills by conducting the consultation using a systematic approach</td>
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<td>P4 Collate client information and record using an appropriate format</td>
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<tr>
<td>LO6 Be able to analyse client information and use this to agree goals and plan a personal training programme</td>
<td>P5 Use client information to agree client goals and objectives and identify their readiness to participate</td>
<td>M4 Use strategies to promote and sell other products or services that meet the client’s needs</td>
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<td>P6 Use client information to plan a personal training session to meet client goals and needs</td>
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<td>P7 Agree programme demands, timetable of sessions and evaluation and review methods with the client</td>
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<tr>
<td>LO7 Be able to prepare and manage a personal training programme</td>
<td>P8 Plan a detailed progressive personal training programme to achieve client goals</td>
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<td></td>
<td>P9 Agree how to maintain contact with the client between sessions</td>
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<td></td>
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<tr>
<td>LO8 Be able to review progress with clients and adapt personal training programmes</td>
<td>P10 Record all details of the personal training programme using an appropriate format</td>
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<td>P11 Select appropriate methods to gather information to inform the review progress</td>
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<tr>
<td>P12 Discuss the purpose of reviewing progress and negotiating changes with clients</td>
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Assessment guidance

Assessors must use the amplified assessment guidance in this section to judge whether assessment criteria have been achieved in the graded practical assessment.

**P1 Welcome the client and use appropriate communication skills to build rapport**

Learners must demonstrate that they have set up the consultation area in line with health and safety requirements and best practice guidelines for consulting with clients. All necessary resources should be available before the client arrives.

Learners must demonstrate appropriate professional conduct and appropriate communication skills to welcome and build rapport with the client. They must demonstrate active listening and show sensitivity and empathy towards information the client shares with regards to their readiness, motivation, current activity, fitness levels and preferences.

**P2 Collect client information using appropriate methods, including PAR-Q and physical assessments**

Learners must demonstrate they have collected client information using a range of methods appropriate to the client’s needs. Information gathered should include – personal details, goals, lifestyle, medical history, physical activity history, current health status, activity preferences and barriers to participation.

Methods of assessment should include
- Completion of PAR-Q
- Completion of informed consent
- Observation and assessment of posture
- Conduct physical health assessments
  - Blood pressure (manual and digital)
  - Anthropometrics
  - Height and weight
  - Body Mass Index (BMI)
  - Waist circumference, waist to hip ratio, body composition
- Conduct fitness assessments (as appropriate for client)
  - Cardiovascular fitness – use validated/recognised protocols, e.g. Astrand bike test, Rockport walking test
  - Range of motion – use validated/recognised protocols, e.g. sit and reach test, visual assessment during stretch positions
  - Muscular fitness – use validated/recognised protocols, e.g. abdominal curl / sit up test, press-up test

All information should be recorded as part of the client profile.

**P3 Provide feedback on the outcomes of assessments**

Learners must demonstrate effective and assertive communication skills when providing the client with feedback on the outcomes of any physical assessments. All feedback should be concise, constructive, and positive and used to motivate and encourage the client. Learners must be sensitive to their own and the client’s body language and facial expressions. Learners must answer any questions the client has in relation to the assessment outcomes.
### P4 Collate client information and record using an appropriate format

Learners must collate client information using the appropriate records including – PAR-Q, informed consent and client profile including physical assessment outcomes.

Learners must demonstrate appropriate client confidentiality when handling records and sharing information (where relevant).

All records must be completed accurately and in full.

### P5 Use client information to agree client goals and objectives and identify their readiness to participate

Learners must demonstrate that they have used all information gathered from clients to agree goals and identify the client’s readiness to participate. Client goals may be process or outcome goals (short, medium, and long-term) and the SMART formula should be used (Specific, Measureable, Achievable, Realistic, Timely). Information analysed to set goals must include:

- **Client objectives** – general health and fitness (e.g. energy level), physiological (e.g. muscular endurance), psychological (e.g. self esteem), lifestyle (e.g. diet), social (e.g. interaction), functional ability (e.g. mobility)
- **Client health status** – responses to PAR-Q, lifestyle, motivation, barriers, preferences, results from any physical or health assessments
- **Physical or health assessment outcomes** – blood pressure, range of motion assessments, posture
- **Client fitness, skill and experience** – beginner or experienced gym equipment user, motor skill and fitness levels
- **Client readiness to participate** – stage of change, readiness to change, barriers to overcome barriers (e.g. access, time, anxiety)
- **Preferred training environment** – gym, outdoors, clients home or workplace, pool
- **Client availability** – time and dates

Goals should be recorded as part of the client profile and progressive programme.
### P6 Use client information to plan a personal training session to meet client goals and needs

Learners must demonstrate that they have planned the personal training session to meet all client needs and goals. The plan must include information on the

#### Exercise environment
- Not designed for exercise – outdoors (parks, beaches, woodland), client’s home (room, garage, garden) or workplace and how to work safely
- Designed for exercise – gym, studio, pool, sports hall

#### Equipment
- Portable – mats, small portable equipment, e.g. stability ball, steps, medicine ball, skipping rope, bench, barbell, dumbbell, step, tubing
- Fixed equipment – cardiovascular machines, resistance machines, Olympic bars, racks

#### Session structure and content
- Warm up and cool down
- Main exercises – duration, intensity and exercise/equipment choice suited to client goals and needs
- Exercise intensity – use evidence based guidelines for exercise intensity prescription and monitoring
- Appropriate training approach for client needs

All information should be recorded on the personal training session card (single session).

### P7 Agree programme demands, timetable of sessions and evaluation and review methods with the client

Learners must demonstrate that they have agreed the demands of the sessions, the timetable of planned sessions and the evaluation and review methods and dates with clients.

All information should be recorded on the personal training progressive programme.
P8 Plan a detailed progressive personal training programme to achieve client goals

Learners must demonstrate that they have planned a progressive programme to achieve client goals. The progressive programme should include the following information:

- Number of weeks and number of sessions per week
- Components of the session
  - Warm up (mobility, pulse raiser and stretch)
  - Cardiovascular exercises
  - Resistance exercises
  - Cool down and stretching activities
- Environment, exercise/equipment name, reps, sets, intensity, duration, level or resistance, muscle group, realistic timings and sequences, alternatives and progressions, teaching points
- Review dates and methods
- Health and safety considerations
- Appropriate use of the principles and variables of training to meet the client’s needs and goals
- Other professionals the programme needs to be shared with
- Programming of a minimum of 2 environments (1 not specifically designed for exercise)
  - Programming of a minimum of 2 cardiovascular approaches
    - Interval
    - Fartlek
    - Continuous
  - Programming of a minimum of 4 resistance training approaches
    - Pyramid systems
    - Super-setting
    - Giant sets
    - Tri sets
    - Forced repetitions
    - Pre/post exhaust
    - Negative/eccentric training
    - Muscular strength/endurance/muscular fitness

All information should be recorded on the progressive programme.

P9 Agree how to maintain contact between sessions

Learners must demonstrate that they have agreed how to maintain contact with clients between sessions.

All information should be recorded on the client profile or personal training progressive programme.
P10 Record all details of the personal training programme using an appropriate format

Learners must record all information regarding the programme on the personal training programme card (single session) and progressive personal training programme (minimum of 12 week progressive overview).

P11 Select appropriate methods to gather information to inform the review progress

Learners must demonstrate they have selected appropriate methods to gather information from clients to review progress. Learners should also plan appropriate review dates with clients. Methods may include reviews of the programme, client feedback, goal reviews and/or the outcomes of any physical reassessments planned as part of the progressive programme.

All information should be recorded on the personal training progressive programme.

P12 Discuss the purpose of reviewing progress and negotiating changes with clients

Learners must demonstrate that they have discussed the purpose of reviewing progress and negotiating changes to the programme or proposed exercises with clients, including discussion of review dates and methods.

M1 Adapt and tailor interpersonal communication during the consultation to thoroughly elicit information

Learners must demonstrate that they have tailored their style of communication to suit and respond to the client. For example, if the client lacks confidence or is new to personal training, the learner can use affirmative statements to increase the client’s confidence and can explain how personal training can help the client to achieve their goals. Clients who indicate that they are sensitive or embarrassed by any information provided (e.g. inactivity or low motivation) or the outcomes of any assessments (e.g. poor flexibility results) can be encouraged by explaining how their personal commitment can help them to make positive changes.

Learners must demonstrate throughout the consultation that all communication with the client is ethical, respectful, unobtrusive and inoffensive and of a suitable and appropriate content and context.

M2 Adapt and tailor assessments used during the consultation to meet client needs

Learners must demonstrate that they can adapt assessments used during the consultation to meet the needs of clients and also the resources available to them. For example, excluding the use of more invasive assessments if a client is embarrassed or sensitive or using an alternative method to assess a specific component of fitness if equipment is unavailable, e.g. a range of motion assessment instead of sit and reach.
M3 Display organisation skills by conducting the consultation using a systematic approach

Learners must demonstrate effective and efficient organisational and time management skills when conducting the consultation and assessments with the client. All resources must be available and ready and the client prepared, in order to ensure the consultation runs smoothly and professionally. All information must be collected using a logical and systematic approach. The consultation must be completed in an appropriate time frame.

M4 Use strategies to promote and sell other products or services that meet the client’s needs

Learners must demonstrate use of appropriate strategies and communication skills to make recommendations for other services and products that meet the client’s needs, for example, lifestyle assessments, weight management courses, other activities and sessions to increase activity levels.

D1 Evaluate the effectiveness of communication skills used during the consultation

Learners must evaluate how communication skills used in the consultation were effective to meet the needs of the client and elicit additional information. Learners must identify all communication skills used in the consultation and identify ways to improve practice.

D2 Justify how the planned progressive programme reflects the client’s longer term goals, individual needs and potential to support long term behaviour change

Learners must demonstrate clear reflection and evaluation of the effectiveness of the planned programme. Drawing conclusions to inform decisions on quality improvements to amend and update future personal training plans. An evaluation of the programme structure, all session components, exercise selection, application of the principles of training (frequency, intensity, time and type) and specific variables (repetitions, range of motion rate) should be recorded and evaluated to achieve an effective review.
Resources

The special resources required for this unit are access to a real or realistic working environment and a variety of equipment which supports the provision of a consultation to prepare and manage a personal training programme.

Best practice should be encouraged by giving learners the opportunity to access current research and guidelines that inform exercise science (e.g. NICE, ACSM, BASES, BHFNC, Department of Health).

**Recommended text books:**


NB: This list is not exhaustive. There are many other valuable text books.

**Recommended websites:**
- National Institute for Health and Care Excellence (NICE) – [www.nice.org.uk](http://www.nice.org.uk)
- American College of Sport Medicine (ACSM) – [www.acsm.org](http://www.acsm.org)
- British Association of Sport and Exercise Science – [www.bases.org.uk](http://www.bases.org.uk)
- British Heart Foundation National Centre – [www.bhfactive.org](http://www.bhfactive.org)
Delivery guidance

Teachers are encouraged to use innovative, practical and engaging delivery methods to enhance the learning experience. Learners may benefit from:

- Meaningful employer engagement so they relate what is being learned to the real world of work and personal training
- Work experience within a personal training studio or gym so they can practise to hone their consultation skills in a real environment
- Using interactive information and technology, systems and hardware so they can learn about concepts and theories; new products and research current trends in personal training
- Practical opportunities to practise consultations and fitness assessments with peers and also ‘real’ clients in a supervised or simulated working environment
- Goal setting workshops where they are able to analyse a range of client information with peers and use this to set goals and prepare personal training programmes
- Planning and presentation workshops where they are able to plan exercise programmes for a specific client case study and discuss their approach with peers
Links with other units

This unit is closely linked with the following units:

**USP51M Anatomy and physiology for exercise and health**
Learners will be required to apply their knowledge of anatomy and physiology when programming personal training sessions in a real or realistic working environment. The content of the anatomy and physiology unit should be delivered before the programming personal training unit.

**USP52M Health, safety and welfare in a fitness environment**
Learners will be required to apply their knowledge of health and safety when programming personal training sessions in a real or realistic working environment. Some content of the health and safety unit (risk assessment) should be delivered before the programming personal training unit.

**USP53M Principles of exercise, fitness and health**
Learners will be required to apply their knowledge of the principles of exercise, fitness and health when programming personal training sessions in a real or realistic working environment. The content of the principles unit should be delivered before the programming personal training unit.

**USP54M Planning gym-based exercise**
Learners will be required to use the knowledge gained from the planning gym-based exercise unit when programming personal training sessions in a real or realistic working environment. The content of the planning gym-based exercise unit should be delivered before the programming personal training unit.

**USP55M Instructing gym-based exercise**
Learners will be required to use the knowledge gained from the instructing gym-based exercise unit when programming personal training sessions in a real or realistic working environment. The content of the instructing gym-based exercise unit should be delivered before the programming personal training unit.

**USP57M Delivering personal training sessions**
Learners will be required to use the knowledge and skills gained from the programming personal training unit and apply this to the delivery of personal training sessions in a real or realistic working environment. The content of the programming personal training unit can be integrated with some content of the delivering personal training unit.

**USP58M Applying the principles of nutrition to a physical activity programme**
Learners will be required to use the knowledge and skills gained from the programming personal training unit when consulting with clients and applying the principles of nutrition to a physical activity programme in a real or realistic working environment. The content of the programming personal training unit can be integrated with the applying the principles of nutrition unit.

**USP59M Behaviour change and adherence**
Learners will be required to use the knowledge and skills gained from the programming personal training unit when consulting with clients to support behaviour change in a real or realistic working environment. The content of the programming personal training unit can be integrated with the behaviour change and adherence unit.
Graded synoptic assessment

At the end of the qualification of which this unit forms part, there will be a graded synoptic assessment which will assess the learner’s ability to identify and use effectively in an integrated way an appropriate selection of skills, techniques, concepts, theories, and knowledge from a number of units from within the qualification. It is therefore necessary and important that units are delivered and assessed together and synoptically to prepare learners suitably for their final graded assessment.